Welcome

Key Learnings from Workshops 1-2

- **Capacity** emerged as the largest barrier that states across all regions are facing in maximizing Bipartisan Infrastructure Law (BIL) funding.

- **Compliance** and **reporting**, in relation to federal requirements, are also key challenges that require support.
  - BABA, Davis Bacon, and NEPA are main bottlenecks.

- Convenings ideally would **result in best practices shared**, better understanding of *how* **to use tools** DOE provides, and **preparedness to meet federal compliance** and reporting requirements.

- General preference for a **mix of in-person** and **virtual,** and both **regional** and **national** convenings depending on topic.
  - **Cohorts of peers** to share best practices are perhaps most valuable.

Key Learnings from Workshops 3

- **State Energy Security Plans*** and **Transmission-Distribution planning** are two key Transformation Collaborative (TC) topics.
  - *****SESP TA cohorts led by CESER are already in development. CESER SESP cohorts will cover a range of topics based on state feedback. Cohort participation will not require cohort fees.***

- **Document review**, support in **navigating federal requirements**, and **case studies/peer exchange** are some of the most valuable forms of RLF TA.

Synopsis of Workshop 4

Prompt One: What are your top challenges to braiding and stacking funding that you have encountered (or anticipate encountering)?

- **Northeast (4 SEOs):** Capacity (2 votes), and 1 vote each for other 3 (difficult to coordinate, incompatible Fed requirements, lack of examples).

- **Mid-Atlantic (1 SEO):** Lack of examples or innovative solutions on how to achieve braiding and stacking (2 votes), and 1 vote each for other 3 (other, incompatible Fed requirements, capacity).

- **Southeast (3 SEOs):** Difficult to coordinate (3 votes), incompatible Fed requirements (4 votes), lack of examples or innovative solutions on how to achieve braiding and stacking (2 votes), Other (1 vote).

- **Midwest (3 SEOs):** States were evenly split between lack of examples or innovative solutions on how to achieve braiding or stacking, difficulties coordinating, and incompatible Fed requirements. Lack of state funding was also mentioned as a barrier.

- **Central (1 SEO):** Capacity is the top challenge (2 votes), otherwise evenly split between lack of examples or innovative solutions on how to achieve braiding or stacking, difficulties coordinating, and incompatible Fed requirements.

- **West (4 SEOs):** Incompatible Fed requirements was the top barrier (2 votes), with each of the other barriers receiving 1 vote.

Synopsis of Workshop 4

Prompt Two: Does your state plan to braid or stack funding from different BIL, IRA, or annual programs? Are any states willing to provide an example?

- **Northeast:** Two states are exploring stacking IRA with annual WAP funding. NH may be using Solar for All funding (depending on how application fares) to expand their state LMI solar program or IRA rebate funding on their NHSaves Program (which is run by their utilities).

- **Mid-Atlantic:** One state is braiding the RLF and EECBG programs, wants to leverage RLF funds with EECBG block grants to further capitalize the programs and allow more projects to be carried out.

- **Southeast:** Two states are evaluating braiding, but there are difficulties such as increased administrative burdens. Braiding/stacking without supplanting is a big question. Administrative guidelines/requirements are not standardized across funding streams, which can make braiding difficult.

- **Midwest:** Two states are exploring braiding/stacking; one state is seeking more clarity on the ability to braid/stack federal funds with one another.

- **Central:** Interest in braiding/stacking WAP and IRA, exploring other opportunities.

- **West:** No feedback.

Synopsis of Workshop 4

Prompt Three: What resources would be most valuable to help your state braid and stack funds from different funding sources?

- **Northeast:** Resources like a checklist of actions to ensure compliance across multiple programs.

- **Mid-Atlantic:** Tools to crosswalk Fed requirements across multiple programs, and tailored reporting requirements for specific braided programs.

- **Southeast:** Clearer guidance on administrative requirements for each program to leverage braiding.

- **Midwest:** More information on Fed requirements, particularly on energy audits.

- **Central:** More information on how programs can be braided/stacked, with examples.

- **West:** No feedback.

Synopsis of Workshop 4

Prompt Four: To assist DOE in providing federal regulatory compliance TA, please rank the following by your state's greatest needs.

- **Northeast:** First: BABA and DBA tied; Second: Programmatic-specific requirements; Third: NEPA; Fourth: Reporting; Fifth: Reporting. Specific example is RLF Energy Audit requirements.

- **Mid-Atlantic:** First: DBA; Second: BABA; Third: Reporting; Fourth: NEPA; Fifth: Program-specific requirements. DBA and BABA requirements are greatest needs.

- **Southeast:** First: BABA; Second: Program Specific requirements; Third: Reporting; Fourth: DBA; Fifth: NEPA; Sixth: Other (e.g., Justice40: What do state's need to gather for reporting?)

- **Midwest:** First: DBA; Second: BABA; Third: NEPA; Fourth: Program-specific requirements; Fifth: Reporting

- **Central:** First: BABA; Second: DBA; Third: Reporting; Fourth: Program-specific requirements; Fifth: NEPA

- **West:** First: Program Specific Requirements; Second: DBA; Third: BABA; Fourth: Reporting; Fifth: NEPA

Synopsis of Workshop 4

- **Prompt Five:** How likely is your state to take advantage of direct TA if the RLF TA model was scaled up to support SEP BIL? Are there any suggested changes?

  - **Northeast:** *Response 1*: We used the form for EE RLF back in July. Following a similar approach would be helpful. Having the ability to meet 1:1 with a SME is a good step. *Response 2*: This approach seems helpful. We would use this tool. No suggested changes.

  - **Mid-Atlantic:** Very likely in general to use this style of requesting direct TA, but for PA, there is nothing specifically in SEP BIL that needs technical assistance.

  - **Southeast:** It couldn't hurt. Gives states the ability to access TA that is being paid for out of their allocation. It would be helpful to capture the needs/responses via a FAQ or similar report-out.

  - **Midwest:** There is a greater need for compliance TA than program design. Compliance is the biggest priority.

  - **Central:** Will take advantage of any and all TA offered. Interested in reallocating unused TA hours.

  - **West:** No feedback.

Synopsis of Workshop 4

- **Prompt Six:** If provided a limited number of direct TA hours with a TA provider (e.g., ~25 hours per year), what topic areas or types of TA needs would be best supported by this resource?

  - **Northeast:** Navigating Fed requirements.

  - **Mid-Atlantic:** Areas where there is no prior expertise from previous programs. RFP writing to find an appropriate third-party partner.

  - **Southeast:** Would like the ability to select TA providers instead of the provider being dictated. Access to SME, which could help the state receive swift answers. Distinguish between what to go to the PO for vs. SME so that states do not burn through their allotted TA hours.

  - **Midwest:** BABA. We need landing pages and lists of compliant technologies that are easy to share.

  - **Central:** Interested in any topic that would be offered.

  - **West:** No feedback.

Synopsis of Workshop 4

- **Prompt Seven:** Would your state benefit from this proposed office hours structure and schedule? Do you have any suggestions or preferences on frequency and timing?

    - **Northeast:** No feedback.

    - **Mid-Atlantic:** Advice about the specific topic should be solicited by people attending the office hours. Better to delegate a specific time for a state to meet and create a rapport with the same person rather than having an open meeting.

    - **Southeast:** As projects advance, office hours would be helpful. Monthly basis preferred.

    - **Midwest:** Yes, if agendas were shared in advance, and if the topics are relevant.

    - **Central:** Interested in having a regularly scheduled time. Friday morning is preferred. Recordings would be helpful, but respondent recognizes sensitivities.

    - **West:** No feedback.

General Discussion
Any additional thoughts or feedback?

Closing

- Your input is invaluable. This month, we have been hosting weekly office hours on Fridays from 12:00-2:00 pm ET to gather additional TA feedback (including tomorrow). We will be pausing office hours after tomorrow until November with a new structure to cover more specific topics and implement your feedback.

- We strongly encourage attendees to provide written feedback on prompts to your SEP Project Officer, erin.taylor@hq.doe.gov, and/or monica.andrews@hq.doe.gov.

Next Steps

Based on your feedback, DOE will develop and execute the SEP BIL TA Implementation Plan.

Please find a tentative timeline below:

- **October 2023:** SEP begins drafting the Implementation Plan, incorporating feedback from workshops, office hours, and other ongoing discussions.

- **December 2023:** SEP finalizes draft Implementation Plan.

- **January 2024:** SEP distributes draft Implementation Plan to SEOs for review.

- **Mid-February 2024:** States deliver feedback on draft Implementation Plan.

- **March 2024:** SEP works to finalize the Implementation Plan and launches the SEP BIL TA intake form.

Thank You!